



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

| | | | |
|----------------------|----------------------|--|---------------------------------|
| DOD: 01/20/12 | | PUBLIC GUARDIAN , Conservator, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | | |
| | | Final Account period: 02/10/09 – 01/20/12 | |
| Cont. from | | Accounting - \$43,629.12 | |
| | Aff.Sub.Wit. | Beginning POH - \$3,033.50 | |
| ✓ | Verified | Ending POH - \$2,195.74 | |
| | Inventory | | |
| | PTC | | |
| | Not.Cred. | Subsequent Account period: 01/21/12 – 04/18/12 | |
| ✓ | Notice of Hrg | Accounting - \$2,554.95 | |
| ✓ | Aff.Mail w/ | Beginning POH - \$2,195.74 | |
| | Aff.Pub. | Ending POH - \$2,554.95 | |
| | Sp.Ntc. | | |
| | Pers.Serv. | Conservator - \$1,738.80 (9.8 Deputy hours @ \$96/hr. and 10.5 staff hours @ \$76/hr.) | |
| | Conf. Screen | | |
| | Letters | Attorney - \$2,000.00 (Less than allowed per Local Rule) | |
| | Duties/Supp | | |
| | Objections | Bond fee - \$75.00 (ok) | |
| | Video Receipt | | |
| | CI Report | Petitioner requests that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions. | |
| | 2620(c) n/a | | |
| ✓ | Order | | |
| | Aff. Posting | | Reviewed by: JF |
| | Status Rpt | | Reviewed on: 06/21/12 |
| | UCCJEA | | Updates: |
| | Citation | | Recommendation: |
| | FTB Notice | Petitioner prays for an Order: | File 1 - Santiago |
| | | <ol style="list-style-type: none"> 1. Finding that the conservatorship of the person and estate terminated on 01/20/12, the conservatee's date of death; 2. Approving, allowing and settling the Second and Final account; 3. Authorizing the conservator and attorney's fees and commissions; 4. Authorizing payment of the bond fee; and 5. Authorizing Petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions. | |

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

| | | | |
|----------------------|----------------------|--|---------------------------------|
| DOD: 01/26/12 | | PUBLIC GUARDIAN , Conservator, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | | |
| | | Final Account period: 03/01/10 – 01/26/12 | |
| Cont. from | | | |
| | Aff.Sub.Wit. | Accounting - \$26,327.12 | |
| ✓ | Verified | Beginning POH - \$349.14 | |
| | Inventory | Ending POH - \$1,760.12 | |
| | PTC | Subsequent Account period: 01/27/12 – 04/17/12 | |
| | Not.Cred. | | |
| ✓ | Notice of Hrg | Accounting - \$1,811.12 | |
| ✓ | Aff.Mail w/ | Beginning POH - \$1,760.12 | |
| | Aff.Pub. | Ending POH - \$1,811.12 | |
| | Sp.Ntc. | | |
| | Pers.Serv. | Conservator - \$1,428.80 (8.55 Deputy hours @ \$96/hr. and 8 Staff hours @ \$76/hr.) | |
| | Conf. Screen | | |
| | Letters | Attorney - \$2,000.00 (Per Local Rule) | |
| | Duties/Supp | | |
| | Objections | Bond Fee - \$50.00 (ok) | |
| | Video Receipt | | |
| | CI Report | Petitioner requests that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions. | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | Reviewed by: JF |
| | Status Rpt | | Reviewed on: 06/21/12 |
| | UCCJEA | | Updates: |
| | Citation | | Recommendation: |
| | FTB Notice | Petitioner prays for an Order: | File 2 - Wruk |
| | | 6. Finding that the conservatorship of the person and estate terminated on 01/26/12, the conservatee's date of death; | |
| | | 7. Approving, allowing and settling the Second and Final account; | |
| | | 8. Authorizing the conservator and attorney's fees and commissions; | |
| | | 9. Authorizing payment of the bond fee; and | |
| | | 10. Authorizing Petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions. | |

Petition for Instructions Ordering JPMorgan Chase Bank, N.A. to Release
 Conservatee's IRA Account Funds to the Public Guardian Pursuant to Probate
 Code 850 (a)(1)(D)

| | | | |
|-------------------|---------------|--|--------------------------|
| DOB: 6-28-27 | | PUBLIC GUARDIAN, Conservator, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| DOD: 11-26-09 | | | |
| | | | |
| | | | |
| Cont. from 061312 | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| | Inventory | | |
| | PTC | | |
| | Not.Cred. | | |
| ✓ | Notice of Hrg | <p>Petitioner states that prior to the Conservatee's death on 11-26-09, Deputy Public Guardian Stacy Mauro traveled to Chase Bank and close out the Conservatee's checking and CD accounts. She also closed the Chase IRA; however, was told that the check would be mailed to her office, rather than receiving it at the bank.</p> <p>Deputy Mauro was asked more than once to provide documentation, including certified and notarized documents. She provided everything Chase requested, but they still refused to turn over the funds with no explanation, despite the fact that the branch employee acknowledged the documentation.</p> <p>The Conservatee died on 11-29-09, after the account was closed.</p> <p>SUSAN TROTTER was appointed as executor of the Conservatee's will on 2-4-10, and Letters issued on that day. Since Chase had not sent the IRA funds as of that date, Ms. Trotter sought to have them released to her.</p> <p>Like Deputy Mauro, Ms. Trotter provided all documentation requested by Chase Bank, yet they still refused to turn the funds over to her with no explanation.</p> <p>Petitioner therefore requests an order under Probate Code §850 to order Chase Bank to release the deceased Conservatee's IRA account funds to the Public Guardian.</p> | |
| ✓ | Aff.Mail | | W |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| | Pers.Serv. | | |
| | Conf. Screen | | |
| | Letters | | |
| | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| | CI Report | | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| | UCCJEA | | |
| | Citation | | |
| | FTB Notice | | |

Continued from 6-13-12
Minute Order 6-13-12 states Counsel informs the Court that Mr. Ivy is requesting a continuance.

As of 6-20-12, nothing further has been filed.

Note: According to the previously settled Final Account, the balance of the Chase IRA was \$26,097.76 as of 3-6-10.

Note: Chase Bank was personally served with Summons, Notice of Hearing, and a copy of the petition via CT Corporation as agent for service of process.

Note: Examiner notes that the Public Guardian's time itemization associated with the first account indicates that Deputy Mauro traveled to Chase on at least two occasions during the conservatorship, beginning at appointment (all prior to the Conservatee's death) to close accounts. See entries on 4-27-09 and 11-13-09.

Reviewed by: skc

Reviewed on: 6-20-12

Updates:

Recommendation:

File 3 - Phelps

Allowance of Commissions and Fees, for Extraordinary Fees, Costs Advanced and
(3) Final Distribution (Prob. C. 10800, 10810, 10811, 12201)

| | | | |
|----------------------|--|--|---------------------------------|
| DOD: 10-20-09 | MONICA ABASOLO , Sister and Executor with Full IAEA without bond, is Petitioner. | | NEEDS/PROBLEMS/COMMENTS: |
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| | | | |
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| | | | |
| | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| ✓ | Inventory | | |
| ✓ | PTC | | |
| ✓ | Not.Cred. | | |
| ✓ | Notice of Hrg | | |
| ✓ | Aff.Mail | w | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| | Pers.Serv. | | |
| | Conf. Screen | | |
| ✓ | Letters | 2-18-11 | |
| | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| | CI Report | | |
| ✓ | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| | UCCJEA | | |
| | Citation | | |
| ✓ | FTB Notice | | |
| | | Accounting: \$160,000.00 Beginning POH: \$160,000.00 Ending POH: \$106,559.36 (cash) | |
| | | Executor: Waived | |
| | | Attorney (Statutory): \$4,765.00 | |
| | | Attorney (Extraordinary): \$11,790.00 (for legal services in connection with will contest litigation, unlawful detainer action, 850 petition itemized at Exhibit K) | |
| | | Costs: \$1,938.60 (filing, certified copies, etc.) | |
| | | Distribution pursuant to Decedent's will dated 10-11-09: | |
| | | Monica Abasolo: \$88,065.76 | |
| | | | Reviewed by: skc |
| | | | Reviewed on: 6-22-12 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 4 - Vasquez |

(1) First and Final Account and Report of Personal Representative and Petition for Its Settlement (2) for Allowance of Attorneys' Fees for Ordinary and Extraordinary Services and (3) for Final Distribution (Probate Code 11640)

| | | | |
|----------------------|-------------------------|--|---------------------------------|
| DOD: 02/05/10 | | MARGARET YOUNG , Executor, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | | |
| | | Account period: 02/05/10 – 02/29/12 | 1. Need Order. |
| | | | |
| Cont. from | | | |
| | Aff.Sub.Wit. | Accounting - \$666,070.52 | |
| ✓ | Verified | Beginning POH - \$645,145.92 | |
| ✓ | Inventory | Ending POH - \$597,935.49 | |
| ✓ | PTC | Executor - waived | |
| ✓ | Not.Cred. | | |
| ✓ | Notice of Hrg | Attorney - \$16,125.12 | |
| | Aff.Mail | (\$15,850.48 to Baker, Manock & Jensen and \$274.64 to Quinlan, Kershaw & Fanucchi) | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| | Pers.Serv. | | |
| | Conf. Screen | Attorney x/o fees - \$5,156.00 (per itemization for 27.2 hours of time spent regarding issues involving beneficiary Charles E. Young (a disabled adult) and Petition for Order Confirming that Property should be Paid to the Estate) | |
| | Letters 05/20/10 | | |
| | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| | CI Report | Costs - \$902.46 | |
| ✓ | 9202 | | |
| | Order x | Closing - \$5,000.00 | |
| | Aff. Posting | | |
| | Status Rpt | Distribution, pursuant to Decedent's Will, is to: | Reviewed by: JF |
| | UCCJEA | | Reviewed on: 06/22/12 |
| | Citation | | Updates: |
| ✓ | FTB Notice | Margaret A. Young - \$147,073.96 cash, plus a 1949 Chevrolet pickup, miscellaneous household furniture and furnishings, and an undivided ½ interest in real property | Recommendation: |
| | | Margaret A. Young as Trustee of the Charles E. Young Special Needs Trust - \$164,677.95 cash, plus an undivided ½ interest in real property | File 5 - Young |

(1) First Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney and for (3) Dispensation of Further Accounts (Prob. Code 2620; 2623; 2628; 2630; 2942)

| | | | |
|--|---|---|---------------------------------|
| Age: 52 | | PUBLIC GUARDIAN , Conservator, is Petitioner. Account period: 3-4-11 through 4-4-12 Accounting: \$17,590.51 Beginning POH: \$208.58 Ending POH: \$3,624.02 (cash) Conservator: \$5,809.36 (45.71 Deputy hours @\$96/hr and 18.70 Staff hours @ \$76/hr itemized at Exhibit B) Attorney: \$2,000.00 (per local rule) Bond fee: \$25.00 (ok) Petitioner requests that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the unauthorized fees and commissions. Petitioner states that the conservatorship estate meets the requirements of Probate Code §2628 to dispense with further accountings as long as the conservatorship estate meets the requirements of Probate Code §2628. Petitioner prays for an Order: 1. Approving, allowing and settling the account; 2. Authorizing the conservator and attorney fees and commissions; 3. Payment of the bond fee; 4. Authorizing petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions; 5. Dispensation of further accounts; and 6. Other relief that the Court considers proper. | NEEDS/PROBLEMS/COMMENTS: |
| DOB: 12-4-59 | | | |
| | | | |
| | | | |
| Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> Verified | | | |
| <input checked="" type="checkbox"/> Inventory | | | |
| PTC | | | |
| Not.Cred. | | | |
| <input checked="" type="checkbox"/> Notice of Hrg | | | |
| <input checked="" type="checkbox"/> Aff.Mail | W | | |
| Aff.Pub. | | | |
| Sp.Ntc. | | | |
| Pers.Serv. | | | |
| Conf. Screen | | | |
| Letters | | | |
| Duties/Supp | | | |
| Objections | | | |
| Video Receipt | | | |
| <input checked="" type="checkbox"/> CI Report | | | |
| 2620(c) | | | |
| <input checked="" type="checkbox"/> Order | | | |
| Aff. Posting | | | |
| Status Rpt | | | |
| UCCJEA | | | |
| Citation | | | |
| FTB Notice | | | |

Reviewed by: skc

Reviewed on: 6-22-12

Updates:

Recommendation:

File 6 - Lopez

Atty Burnside, Leigh W. (for Charlene Smith – Executor/Petitioner)

Atty McBride, Julia (for Holly Sweeney – daughter)

(1) Petition for Termination of Further Proceedings and (2) for Discharge of Personal Representative (Probate Code 12251)

| | | | |
|-------------------------------------|----------------------|---|---|
| DOD: 08/13/10 | | <p>CHARLENE SMITH, Petitioner, was appointed Executor without bond and Letters were issued on 03/08/12.</p> <p>Petitioner states:</p> <ol style="list-style-type: none"> In her Petition for Probate, Petitioner alleged that the value of the assets of Decedent subject to probate administration was unknown. At that time, Petitioner was appointed to defend the estate against a Creditor's Claim filed by Holly Sweeney, individually and as Trustee of the Richard Howard Smith & Patricia H. Smith Revocable Living Trust dated 11/07/95 ("Dispute"), and to determine if there were any assets subject to probate administration. On or about 04/13/12, the Dispute was settled. Upon resolution of the Dispute, it was determined that there were no assets of the estate subject to probate administration. Petitioner has diligently searched for all assets of the Decedent but has failed to discover any property of any kind belonging to the estate that is subject to administration. All costs and expenses incurred in the administration of the estate have been paid. No request for special notice has been filed. <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> Terminating further proceedings for the administration of the estate; and Discharging Petitioner, Charlene Smith, as the court appointed personal representative of the estate. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A Withdrawal and Discharge of Creditor's Claim was filed 05/16/12 by Holly Sweeney individually and as Trustee of the Richard Howard Smith & Patricia H. Smith Revocable Living Trust dated 11/07/95</p> |
| Cont. from | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input checked="" type="checkbox"/> | Verified | | |
| <input type="checkbox"/> | Inventory | | |
| <input type="checkbox"/> | PTC | | |
| <input type="checkbox"/> | Not.Cred. | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | |
| <input checked="" type="checkbox"/> | Aff.Mail w/ | | |
| <input type="checkbox"/> | Aff.Pub. | | |
| <input type="checkbox"/> | Sp.Ntc. | | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input type="checkbox"/> | Conf. Screen | | |
| <input type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |

Reviewed by: JF

Reviewed on: 06/22/12

Updates:

Recommendation:

File 7 - Smith

Petition to Determine Succession to Real Property (Prob. C. 13151)

| | | |
|---|--|---|
| DOD: 2-1-10 | FELICIA GARCIA , Spouse, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | |
| | | |
| | | |
| Cont. from 030812, 032212, 032912 | Declaration filed 4-18-12 includes the Decedent's four children MONICA RODRIGUEZ, STEPHANIE GARCIA, ELIZABETH R. GARCIA, and EZEKIAL GARCIA, JR. , as additional petitioners. | <u>Minute Order 3-29-12</u> : The Court would accept declarations by the other Garcia children stating the petitioner is acting on his/her behalf and that each could benefit. Those not wanting to partake could file a quitclaim. |
| <input type="checkbox"/> Aff.Sub.Wit. | 40 days since DOD | Examiner notes that the Declaration filed 4-18-12 is signed by all heirs and requests distribution pursuant to Probate Code §6401. |
| <input checked="" type="checkbox"/> Verified | No other proceedings | Examiner has interlineated the Order to reflect distribution pursuant to the Declaration. |
| <input checked="" type="checkbox"/> Inventory | | |
| <input checked="" type="checkbox"/> PTC | | |
| <input type="checkbox"/> Not.Cred. | I&A: \$45,000.00 | |
| <input checked="" type="checkbox"/> Notice of Hrg | Decedent died intestate | |
| <input checked="" type="checkbox"/> Aff.Mail | | |
| | | |
| <input type="checkbox"/> Aff.Pub. | Petitioner states Decedent inherited certain real property in Orange Cove, CA from his father in 1994 and at his death owned a 100% sole and separate interest in the property. | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | | |
| <input type="checkbox"/> Duties/Supp | Petitioner and Decedent began living together in 1982 and were married in 1995. Monica Rodriguez, Stephanie Ann Garcia, Elizabeth R. Garcia and Ezekial Garcia Jr., are the natural born children of Petitioner and Decedent and Decedent did not have any other children, living or deceased. | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | Petitioners request court determination that Decedent's 100% interest in the real property passes to them pursuant to intestate succession as follows: | Reviewed by: skc |
| <input type="checkbox"/> Aff. Posting | | Reviewed on: 6-21-12 |
| <input type="checkbox"/> Status Rpt | | Updates: |
| <input type="checkbox"/> UCCJEA | | Recommendation: SUBMITTED |
| <input type="checkbox"/> Citation | | File 8 - Garcia |
| <input type="checkbox"/> FTB Notice | Felicia Garcia: a 1/3 undivided interest Monica Rodriguez: a 1/6 undivided interest Stephanie Ann Garcia: a 1/6 undivided interest Elizabeth R. Garcia: a 1/6 undivided interest Ezekial Garcia, Jr.: a 1/6 undivided interest | |

Atty Vallis, James H. (for Petitioner Donna Day)
 Atty Sanoian, Joanne (Court-appointed for Conservatee)

Petition for Appointment of Probate Conservator of the Person
(Prob. C. 1820, 1822680-2682)

| | | | |
|-------------------|---------------|--|--|
| Age: 89 years | | <p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>DONNA DAY, daughter, is Petitioner and requests appointment as Conservator of the person with medical consent powers.</p> <p>Declaration of Neil A. Smith, D.O., filed 4/6/2012 supports medical consent and dementia powers.</p> <p>Petitioner states the proposed Conservatee is unable to keep his medications straight and many times forgets to take them. He believes someone is breaking into his home and stealing items. He goes to the bank to check on his balance and claims someone is getting into his accounts and taking it away from him. He takes large amounts of money out to transfer it to new accounts or other banks. Petitioner states she has been writing his checks and paying his bills for a couple of years. He does not understand how severe his problem is.</p> <p>Court Investigator Jennifer Young's Report was filed 6/22/2012.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5/17/2012 at the request of Attorney Vallis.</p> <p>Note: Proposed Conservatee has <u>not</u> been advised of his rights. Court Investigator Jennifer Young's Report filed 6/22/2012 states she was unable to provide <i>Advisement of Rights</i> as the proposed Conservatee is in Barstow, CA, and that following a reciprocal request to the San Bernardino County Court Investigator's Office on 5/15/2012 to have the proposed Conservatee advised of his rights, she was informed by that office that they are unable to meet with the proposed Conservatee due to their office being busy and his location being a distance away from their office.</p> <p>Note: The <i>Petition</i> does not include the mandatory <i>Attachment Requesting Special Orders Regarding Dementia</i> (Judicial Council form GC-313.) However, it appears Petitioner in fact requests dementia powers, and Court may wish to confirm Petitioner's request.</p> |
| DOB: 9/1/1922 | | | |
| | | | |
| | | | |
| Cont. from 051712 | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| | Inventory | | |
| | PTC | | |
| | Not.Cred. | | |
| ✓ | Notice of Hrg | | |
| ✓ | Aff.Mail | | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| | Pers.Serv. | | |
| ✓ | Conf. Screen | | |
| ✓ | Letters | | |
| ✓ | Duties/Supp | | |
| | Objections | | |
| ✓ | Video Receipt | | |
| ✓ | CI Report | | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| | UCCJEA | | |
| ✓ | Citation | | |
| | FTB Notice | | |

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|-----------------------|
| Reviewed by: KT / LEG |
| Reviewed on: 6/22/12 |
| Updates: 6/25/12 |
| Recommendation: |
| File 9 - Reeves |

Atty Fishman, Robert G.; Callister, Jared R., of Fishman Larsen Goldring & Zeidler (for Petitioner Peter Nagel)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

| | | | | |
|------------------------|--------------------------|-----|---|---------------------------------|
| DOD: 12/18/2009 | | | PETER NAGEL , spouse and named Executor without bond, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | | | |
| | | | Full IAEA – O.K. | |
| | | | | |
| Cont. from | | | Will dated: 5/23/2006 | |
| | Aff.Sub.Wit. | S/P | | |
| ✓ | Verified | | Residence – Fresno Publication – Business Journal | |
| | Inventory | | | |
| | PTC | | | |
| | Not.Cred. | | | |
| ✓ | Notice of Hrg | | Estimated value of the Estate: | |
| ✓ | Aff.Mail | W/O | | |
| ✓ | Aff.Pub. | | Real property | - \$257,000.00 |
| | Sp.Ntc. | | | |
| | Pers.Serv. | | Total | - \$257,000.00 |
| | Conf. Screen | | Probate Referee: Steven Diebert | |
| | Aff. Posting | | | |
| ✓ | Duties/Supp | | Reviewed by: LEG Reviewed on: 6/22/12 Updates: Recommendation: SUBMITTED File 10 - Nagel | |
| | Objections | | | |
| | Video Receipt | | | |
| | CI Report | | | |
| | 9202 | | | |
| ✓ | Order | | | |
| ✓ | Letters | | | |
| | Status Rpt | | | |
| | UCCJEA | | | |
| | Citation | | | |
| | FTB Notice | | | |

Atty Dowling, Michael P. (for Edward E. Anderson – son/Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

| | | | | |
|---------------|---------------|-----|---|--|
| DOD: 01/25/12 | | | EDWARD E. ANDERSON , son/named Executor without bond, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | | | |
| Cont. from | | | Full IAEA – OK | 1. The Petition states that the decedent had a predeceased spouse. Need date of death of predeceased spouse pursuant to Local Rule 7.1.1 D. 2. Need Order and Letters. |
| | Aff.Sub.Wit. | s/p | Will dated 05/05/93 | |
| ✓ | Verified | | Residence: Fresno | Note: If the petition is granted status hearings will be set as follows: • Friday, 10/26/2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Friday, 08/16/2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. |
| | Inventory | | Publication: The Business Journal | |
| | PTC | | Estimated Value of the Estate: | Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. |
| ✓ | Notice of Hrg | | | |
| ✓ | Aff.Mail | w/ | Annual income - 1,000.00 | |
| ✓ | Aff.Pub. | | Total - \$180,378.51 | |
| | Sp.Ntc. | | Probate Referee: RICK SMITH | |
| | Pers.Serv. | | | |
| | Conf. Screen | | | |
| | Letters | x | | |
| ✓ | Duties/Supp | | | |
| | Objections | | | |
| | Video Receipt | | | |
| | CI Report | | | |
| | 9202 | | | |
| | Order | x | | |
| | Aff. Posting | | | |
| | Status Rpt | | | |
| | UCCJEA | | | |
| | Citation | | | |
| | FTB Notice | | | |

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|------------------------------|
| Reviewed by: JF |
| Reviewed on: 06/22/12 |
| Updates: |
| Recommendation: |
| File 11 - Anderson |

Atty Dornay, Val J., sole practitioner (for Petitioners Doungta Oudomdy, Joy Oudomdy, Souriyo Oudomdy and Souphaphone Sielawa)

Petition to Determine Succession to Real Property (Prob. C. 13151)

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|-------------------------------------|----------------------|--|---------------------------------|-----|
| DOD: 10/2/2011 | | DOUNGTA OUDOMDY, JOY OUDOMDY, SOURIYO OUDOMDY and SOUPHAPHONE SIELAWA , spouse and children, are Petitioners. 40 days since DOD. No other proceedings I & A - \$55,000.00 Decedent died intestate. Petitioner requests Court determination that Decedent's 100% interest in real property located at 5167 E. Lamona, Fresno, passes to the Petitioners pursuant to intestate succession, as follows: DOUNGTA OUDOMDY – 1/3 interest; JOY OUDOMDY – 2/9 interest; SOURIYO OUDOMDY – 2/9 interest; SOUPHAPHONE SIELAWA – 2/9 interest. | NEEDS/PROBLEMS/COMMENTS: | |
| Cont. from | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input checked="" type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | | |
| <input checked="" type="checkbox"/> | Aff.Mail | | | W/O |
| <input type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | |
| <input type="checkbox"/> | Conf. Screen | | | |
| <input type="checkbox"/> | Letters | | | |
| <input type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input checked="" type="checkbox"/> | Order | | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |

Reviewed by: LEG

Reviewed on: 6/22/12

Updates:

Recommendation: SUBMITTED

File 12 - Oudomdy

Atty Janian, Paulette (for Linda J. Bibb – daughter/Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

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|-------------------------------------|---------------|-----|--|--|
| DOD: 10/23/11 | | | LINDA J. BIBB , daughter/named alternate Executor without bond, is Petitioner. Full IAEA – ok Will dated 12/20/99 Residence: Selma Publication: Selma Enterprise <u>Estimated Value of the Estate:</u> Real property - \$44,000.00 Probate Referee: STEVEN DIEBERT | NEEDS/PROBLEMS/COMMENTS: Note: Status hearings will be set as follows: <ul style="list-style-type: none"> • Friday, 10/26/2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Friday, 08/16/2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. |
| Cont. from | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | s/p | | |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | | |
| <input checked="" type="checkbox"/> | Aff.Mail | w/ | | |
| <input checked="" type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | |
| <input type="checkbox"/> | Conf. Screen | | | |
| <input checked="" type="checkbox"/> | Letters | | | |
| <input checked="" type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input checked="" type="checkbox"/> | Order | | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |

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| Reviewed by: JF |
| Reviewed on: 06/22/12 |
| Updates: |
| Recommendation: SUBMITTED |
| File 13 - Berry |

**Petition for Letters of Administration; Authorization to Administer Under IAEA
(Prob. C. 8002, 10450)**

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|-------------------------------------|----------------------|---|--|
| DOD: 08/19/92 | | ALAN CADE, JR. , grandson, is Petitioner, and requests appointment as Administrator without bond. Full IAEA – OK All heirs waive bond??? Decedent died intestate Residence: Fresno Publication: The Business Journal <u>Estimated Value of the Estate:</u> Real property - \$100,000.00 Probate Referee: RICK SMITH | NEEDS/PROBLEMS/COMMENTS: 1. The Petition states that the decedent's spouse and 3 sons are deceased. Need date of death of all deceased persons pursuant to Local Rule 7.1.1D. 2. Nomination of Petitioner and Waivers of Bond have been filed by: Karen Cade Mona Cade James Cade Ada Cade Alberta Cade Alan Cade Jr. Roberta Cade However, because the Petition does not state the dates of death of decedent's three deceased sons, nor are the heirs and/or personal representatives of the deceased sons stated, the Examiner is unable to determine whether these individuals constitute all of the persons from whom a waiver is needed. Need more information. 3. Need Confidential Supplement to Duties and Liabilities (Form DE-147S). <u>Note: If the petition is granted, status hearings will be set as follows:</u> • Friday, 10/26/2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 08/16/2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. |
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| <input type="checkbox"/> | Aff.Sub.Wit. | | |
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| <input type="checkbox"/> | Inventory | | |
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| <input type="checkbox"/> | Not.Cred. | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | |
| <input checked="" type="checkbox"/> | Aff.Mail w/o | | |
| <input checked="" type="checkbox"/> | Aff.Pub. | | |
| <input type="checkbox"/> | Sp.Ntc. | | |
| <input type="checkbox"/> | Pers.Serv. | | |
| <input type="checkbox"/> | Conf. Screen | | |
| <input checked="" type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp x | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution (Prob. C. 12200, et seq.)

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| DOD: 12/14/06 | | <p>JOANNE MILLER, sister, was appointed Administrator and Letters were issue on 07/17/07.</p> <p>Inventory & Appraisal - \$185,000.00 filed 07/09/07.</p> <p>Notice of Status hearing filed 05/15/12 set this matter for status on 06/27/12. Clerk's Certificate of Mailing states that the Notice of Status hearing was mailed to Joanne Miller and Philip Flanigan on 05/15/12.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account and/or Petition for Final Distribution.</p> |
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| Inventory | | | |
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| Not.Cred. | | | |
| Notice of Hrg | | | |
| Aff.Mail | | | |
| Aff.Pub. | | | |
| Sp.Ntc. | | | |
| Pers.Serv. | | | |
| Conf. Screen | | | |
| Letters | | | |
| Duties/Supp | | | |
| Objections | | | |
| Video Receipt | | | |
| CI Report | | | |
| 9202 | | | |
| Order | | | |
| Aff. Posting | | | |
| Status Rpt | | | |
| UCCJEA | | | |
| Citation | | | |
| FTB Notice | | | |
| | | <p>Reviewed by: JF</p> <p>Reviewed on: 06/22/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 - Murchison</p> | |

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| DOD: 12/28/10 | | <p>CAROL OWENS, daughter, was appointed temporary Conservator of the Person and Estate with bond set at \$30,000.00 on 02/10/09.</p> <p>Conservator filed a bond in the amount of \$30,000.00 on 03/09/09.</p> <p>CAROL OWENS, daughter, was appointed Conservator of the Person and Estate and Letters were issued on 08/06/09.</p> <p>Order settling 1st Account and Report of Conservator was filed 11/03/10.</p> <p>Conservatee died on 12/28/10.</p> <p>Notice of Status Hearing filed 01/27/12 set a Status Hearing Re: Termination of Proceeding for Deceased Conservatee on 04/04/12. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Conservator and attorney Kathleen Bakergumprecht-Davies on 01/27/12.</p> <p>Minute Order from 05/09/12 hearing re Order to Show Cause set this matter for status of Final Accounting.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Final Accounting.</p> |
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| Cont. from | | | |
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| Pers.Serv. | | | |
| Conf. Screen | | | |
| Letters | | | |
| Duties/Supp | | | |
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| Video Receipt | | | |
| CI Report | | | |
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| Status Rpt | | | |
| UCCJEA | | | |
| Citation | | | |
| FTB Notice | | | |
| | | <p>Reviewed by: JF</p> <p>Reviewed on: 06/22/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 - McElroy</p> | |

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| | | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account filed 06/21/12.</p> <p>Note: Per Minute Order dated 05/31/12, status hearings have been set as follows:</p> <ul style="list-style-type: none"> • Friday, 10/05/12 at 9:00 am in Dept. 303 for filing of the Inventory & Appraisal • Friday, 10/04/13 at 9:00 am in Dept. 303 for filing of the First Account <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p> |
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| Cont. from | | |
| Aff.Sub.Wit. | | |
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| Inventory | | |
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| Notice of Hrg | | |
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| Pers.Serv. | | |
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| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | | <p>Reviewed by: JF</p> <p>Reviewed on: 06/22/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 - Kemp</p> |